

Key Findings and Recommendations from the Walter and Elise Haas Fund 2022 Grantee Perception Report

Prepared by The Center for Effective Philanthropy

In February and March of 2022, The Center for Effective Philanthropy conducted a survey of Walter and Elise Haas Fund's ("Haas Sr" or "the Fund") grantees. The memo below outlines CEP's summary of key strengths, opportunities, and recommendations. The Fund's grantee perceptions should be interpreted in light of Haas Sr's goals and strategies.

This memo accompanies the comprehensive survey results from 206 respondents (a 63% response rate) found in the Fund's interactive online report at <https://cep.surveymethods.org> and in the downloadable online materials, including grantees' written comments. The Fund's full report also contains more information about survey analysis and methodology.



Overview

- ▶ Every five years since 2007, Walter and Elise Haas Fund commissions a CEP grantee survey to monitor grantees' perceptions and experiences over time. In this 2022 survey, grantees' ratings are generally in line with those at the typical funder despite some downward trends since 2017. Some of these declines reach statistical significance, including for the Fund's advancement of knowledge and effect on public policy, its understanding of grantees' fields, its responsiveness and transparency, and the consistency of its communications.
- ▶ Grantee comments and ratings suggest opportunities to grow its impact by prioritizing responsiveness and continuity across grantee relationships, improving communications about its goals and strategy, and adjusting grantmaking characteristics and providing more non-monetary support.

Positive Perceptions of Impact on Grantees' Fields and Communities

- ▶ As in 2017, grantees ratings for its impact on their fields has remained strong, placing the Fund above the median funder in the dataset. Ratings for the Fund's understanding of grantees' fields are also similar to those at the typical funder.
 - In their open-ended responses, many grantees highlight Haas Sr as "strong advocates" and regular "representative[s] at big...events and meetings" whose funding is "an important seal of approval among leading funders in our field."
 - Interestingly, grantees now rate the Fund lower than typical – and significantly lower than in 2017 – for its advancement of knowledge and effect on public policy.
- ▶ In addition, grantees view the Fund as having a positive impact on their local communities, providing ratings that place Haas Sr in the top 40 percent of the overall dataset and above the typical funder in its custom cohort of peer funders.

- Furthermore, grantees provide ratings in the top 30 percent of the overall dataset for the Fund’s understanding of their local communities and the contexts in which they work.
- These sentiments come through clearly in written comments, with grantees acknowledging the Fund’s “deep roots in the SF Bay Area community” whose “long-term, dedicated [support] has had a tremendous influence on the improved health and wellbeing of our community.”

DEEP COMMITMENT TO HISTORICALLY DISADVANTAGED GROUPS AND STRONG UNDERSTANDING OF THEIR NEEDS

- ▶ Over 85 percent – a larger than typical proportion – of Haas Sr grantees report that their funded work is primarily meant to benefit historically disadvantaged groups, especially African American or Black individuals or communities and Hispanic or Latina, Latino, or Latinx individuals or communities.
- ▶ Importantly, the Fund receives typical ratings for its understanding of the needs of the people and communities that grantees serve and its commitment to and communications about justice, equity, diversity, and inclusion (JEDI).
 - Grantees also agree very strongly that they feel comfortable discussing the implications of JEDI in their work, rating, on average, above a 6 on a 1-7 scale.
- ▶ Grantees’ qualitative and quantitative feedback also include opportunities for how the Fund can deepen its JEDI work, including asking grantees to share input about their beneficiaries, addressing differing needs exacerbated by racial disparities in its support and/or grantmaking, and “support[ing] BIPOC-led organizations that center racial equity and voices of their constituencies in all aspects of the organization's operations.”



“The Fund is a recognized presence and leader in San Francisco. The Fund is a convener and supporter of efforts in creating a stronger, more equitable economy for all SF residents.”

Adjust Grantmaking Characteristics and Provide More Non-monetary Support

- ▶ Ratings for the Fund’s impact on grantees’ organizations continue to be in line with the typical funder.
 - Grantee ratings are also typical for the Fund’s understanding of their organizations and for its awareness of its organizational challenges when compared to CEP’s dataset.
- ▶ Grantmaking characteristics are a strong predictor of grantees’ perceptions of funders’ impact on their organizations. In particular, CEP’s broader research finds that larger, multi-year, and/or general operating support grants are associated with more positive perceptions of impact on grantees’ organizations. Some of the Fund’s grantmaking characteristics remain similar to 2017, while others have changed.
 - Grants continue to be smaller than (\$45K at the median) is typical, and just under half – a larger proportion than in 2017 – report receiving unrestricted funding.
 - While the same proportion of grantees in 2022 report receiving multi-year grants as in 2017, the average grant length reported by grantees has significantly decreased from 3 to 2 years.

- ▶ When asked about the ways the Fund could improve, about a fifth – the second largest category – of written suggestions reference changes to the Fund’s grantmaking characteristics. Grantees primarily ask for more multiyear grants (N=9), larger grants (N=5), and more unrestricted support (N=3).
- ▶ Beyond adjustments to its grant awards, another sixteen grantees share suggestions encouraging the Fund to provide more non-monetary assistance, especially opportunities to collaborate and convene with other grantees (N=11), connections to other funders (N=4), and capacity building support (N=1).
 - A much smaller than typical proportion of grantees – 18 percent – report receiving non-monetary assistance beyond the grant.
 - All of these grantees indicate this support provided at least a minor benefit to their organization or work, and receipt of non-monetary support is related to significantly more positive perceptions of the Fund’s understanding of grantees’ fields, communities, contexts, and organizational challenges.



“The Fund has provided our organization with critical funding which has enabled us to scale our programming and further our research and evaluation efforts.”



“Helping build multi-year support and introductions to other funders to help scale our fundraising capacity.”

Drop in Ratings of Interactions and Communications

- ▶ Grantees describe Fund staff as “responsive and open to feedback,” “supportive and thoughtful in showing up as partners,” and a true partner with whom...[they] can “be honest with, bounce ideas off of, and share challenges as well as successes.” Yet, quantitative ratings for measures related to interactions with the Fund are mixed.
 - Specifically, grantees provide higher than typical ratings for the extent to which the Fund exhibits trust in their organization’s staff, respectful interaction, and compassion for those affected by the funded work. Grantees also agree more strongly than typical that Fund staff embody a commitment to justice, equity, diversity, and inclusion (JEDI).
 - In contrast, perceptions of the Fund’s approachability and openness to their ideas are less positive than typical. Grantees also provide significantly lower ratings for staff’s responsiveness compared to 2017, though ratings are still typical.
- ▶ Certain patterns are associated with higher ratings of the Fund’s interactions with grantees.
 - Over 70 percent of grantees report interacting with their primary contact at least a few times a year, consistent with the Fund’s interaction patterns with grantees in 2017. These grantees rate the Fund significantly higher across key interactions measures, including for its approachability, responsiveness, and openness, and for its understanding of their organizational challenges and contexts.

- Over half of grantees report a change in their primary contact in the six months prior to the survey – a higher proportion than nearly all funders in CEP’s dataset. Grantees who did not experience a contact change rate the Fund significantly higher for its openness and approachability.
 - Mirroring CEP’s broader research, Haas Sr grantees who report experiencing the least pressure (rating a one or two on a 7-point scale) provide significantly higher ratings for all measures related to interactions, as well as measures of impact and understanding.
- ▶ These sentiments are echoed in grantee comments: about 10 percent of suggestions encourage Haas Sr to strengthen relationships through more frequent contact and quicker responses.
 - Two grantees suggest increasing staff capacity to address this. In the Fund’s self-reported data, staff caseload has more than doubled since 2017 to a similar level as in 2012.
 - ▶ In addition to high-quality interactions, communications are another important dimension of funder-grantee relationships. While grantee ratings for clarity of the Fund’s communications are in line with the typical funder in CEP’s dataset and its custom cohort, grantees provide ratings in the bottom 10 percent of the dataset for their understanding of the way in which their works fits into the Fund’s broader efforts.
 - ▶ Furthermore, ratings have significantly declined for the consistency of communication received from different sources since 2017 and are now at a typical level compared to funders in CEP’s dataset.
 - ▶ When asked how the Fund could improve, 20 percent of grantee suggestions (the largest proportion) recommend that the Fund clarify its current priorities and future direction (N=8), contribute to public conversations on prominent issues in the field (N=4), and share more in general (N=3).



“The Fund has been responsive to issues when we reach out, though not proactive.... This has been influenced by many staff transitions, inconsistent communication, and having three main points of contact over the last three years of partnership or connection.”



“...Communications...do tend to be rather sparse. While we do very much appreciate the Fund's lack of micromanagement, we have not heard very much about what is happening at the Fund--how their teams are being restructured, how they are re-strategizing their priorities, etc. Communications are usually prompted by us.”

Continued Efficiency and Helpfulness across Processes

- ▶ Grantees continue to spend less time than is typical on grant requirements – 16 hours compared to 30 hours at the typical funder – which allows them to continue to receive a typical amount of grant money for every hour they spend on Fund-required processes despite smaller than typical grants.
 - Grantees agree more strongly than in 2017 that they did not experience technical difficulties when submitting grant documentation through the online grants portal, and ratings for all

other statements related to their experience with the Fund’s online grants portal remains very similar to ratings in 2017.

- In response to a custom question, grantees note that reductions to proposal and reporting requirements were 2 of the 3 most helpful actions the Fund took to mitigate the negative impacts of COVID-19 on their organizations.
- ▶ Grantee rate Haas Sr higher than 85 percent of other funders in CEP’s dataset for the extent to which its selection process is a helpful opportunity to strengthen the efforts funded by the grant, a significant improvement since 2017.
 - Grantees also provide typical ratings for the extent to which the selection process was appropriate given the amount of funding received and for the clarity and transparency of its requirements, timelines and criteria for determining funding.
- ▶ When it comes to the reporting process, Haas Sr receives higher than typical ratings for the extent to which the reporting process is straightforward and relevant. Perhaps related to the Fund’s COVID-19 response, grantees provide particularly strong ratings for the adaptability of its reporting process, which have significantly improved since 2017 and place the Fund near the top 10 percent of the dataset.



“The requests for time and work...were fairly low and matched well with the amount in funding we received from the Fund. I appreciated that the staff were prompt, very helpful, and also very clear about expectations for the grant we received...”

Recommendations

- ▶ Recognizing grantees’ positive perceptions of the Fund’s impact on and understanding of grantees’ fields and communities, reflect on and carry forward the approaches and decisions that contributed to the Fund’s ability to maintain these strengths during this period of change and uncertainty.
- ▶ Taking into account grantee suggestions, discuss the Fund’s philosophy and parameters around the provision of multi-year grants and/or larger grants, and determine where adjustments to grant awards may result in greater impact.
- ▶ Facilitate internal conversations about how the Fund currently provides non-monetary assistance to grantees, and seek opportunities to hear directly from grantees about how the Fund could build on the types of assistance their organizations most need.
- ▶ Acknowledging the large proportion of grantees who have experienced a contact change and/or experience low-touch interactions, explore approaches to:
 - Increase the proportion of grantees who experience frequent interactions and prioritize staff responsiveness. Also, use interactions as moments to reinforce the Fund’s strategy and goals, and connect those to grantees’ funded work.
 - Diagnose the ways and frequency in which the Fund shares information about its work, long-term direction, and impact with grantees, and develop resources and/or trainings that could help promote more consistent messaging about its approach.

- ▶ Building on grantees' already positive perceptions of the Fund's commitment to justice, diversity, equity, and inclusion, identify areas of work where the Fund would like to deepen these practices in its interactions, grantmaking, and communications.
- ▶ Given high ratings for the helpfulness of reductions in proposal and reporting requirements during COVID-19, consider whether there are changes in Fund processes that could become permanent without compromising its helpfulness.

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